

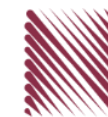


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, October 8<sup>th</sup> 2023





Sunday, October 8, 2023

| Market Watch             | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|--------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |        |      |       |                |                       |
| Saudi (Tasi)             | 10,596.02   | -1.57 | -1.57 | -4.16 | -4.16 | 1.12   | 2.89 | 18.13 | 3.28           | 10,940.77             |
| Qatar (QE Index)         | 10,001.16   | -0.61 | -0.61 | -2.45 | -2.45 | -6.37  | 1.21 | 10.29 | 4.87           | 531.81                |
| Dubai (DFMGI)            | 4,164.61    | 0.52  | 0.02  | 0.02  | 0.02  | 24.84  | 1.52 | 10.24 | 4.24           | 598.35                |
| Abu Dhabi (ADI)          | 9,756.43    | -0.06 | -0.30 | -0.30 | -0.30 | -4.45  | 2.53 | 15.72 | 2.23           | 2,727.29              |
| Bahrain (BAX)            | 1,949.12    | -0.09 | -0.09 | 0.52  | 0.52  | 2.84   | 0.77 | 9.43  | 5.96           | 7.12                  |
| Muscat SE INDEX          | 4,741.78    | 0.14  | 0.14  | 1.56  | 1.56  | -2.38  | 0.85 | 10.29 | 4.64           | 6.64                  |
| SP GCC Comp LMC          | 169.75      | -0.19 | -0.19 | -2.96 | -2.98 | -2.85  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 141.91      | 0.00  | 0.00  | 2.88  | 6.22  | 3.78   |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |        |      |       |                |                       |
| MSCI World Index         | 2,845.23    | 1.02  | -0.28 | -0.28 | -0.28 | 9.32   |      |       |                |                       |
| U.S. (S&P 500)           | 4,308.50    | 1.18  | 0.48  | 0.48  | 0.48  | 12.22  | 3.83 | 22.02 | 2.13           | 38,202.95             |
| U.K. (FTSE 100)          | 7,494.58    | 0.58  | -1.49 | -1.49 | -1.49 | 0.57   | 1.56 | 10.52 | 3.90           | 1,994.87              |
| Japan (topix)            | 2,264.08    | 0.01  | -2.55 | -2.55 | -2.55 | 19.68  | 1.32 | 13.48 | 2.26           | 818,584.02            |
| <b>Emerging Markets</b>  |             |       |       |       |       |        |      |       |                |                       |
| MSCI EM Index            | 937.34      | 0.76  | -1.62 | -1.62 | -1.62 | -1.99  |      |       |                |                       |
| China (SSE Composite)    | 3,110.48    | 0.10  | -0.70 | -0.30 | -2.86 | 0.69   | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 65,995.63   | 0.55  | 0.25  | 0.25  | 0.25  | 8.47   | 4.26 | 22.68 | 1.22           | 129,133.55            |
|                          |             |       |       |       |       |        |      |       |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |       |        |      |       |                |                       |
| Kuwait All Share Index   | 6,732.12    | -0.85 | -0.85 | -2.25 | -2.25 | -7.68  | 1.43 | 15.24 | 3.33           | 44.15                 |
| Kuwait Premier Index     | 7,353.45    | -0.65 | -0.65 | -2.23 | -2.23 | -9.39  | 1.49 | 16.47 | 2.83           | 35.20                 |
| Kuwait Main Index        | 5,584.89    | -1.56 | -1.56 | -2.32 | -2.32 | -0.21  | 1.03 | 10.91 | 3.95           | 8.97                  |
| <b>Kuwait Sector</b>     |             |       |       |       |       |        |      |       |                |                       |
| Banking                  | 1,630.33    | -0.76 | -0.76 | -2.98 | -2.98 | -9.12  | 1.67 | 17.26 | 2.79           | 27.96                 |
| Telecom                  | 1,047.80    | -1.66 | -1.66 | -2.28 | -2.28 | -11.31 | 1.61 | 9.92  | 6.63           | 3.27                  |
| Industrials              | 893.08      | -1.38 | -1.38 | -2.94 | -2.94 | -17.22 | 1.01 | 15.65 | 3.09           | 3.18                  |
| Financial Services       | 1,224.55    | -0.90 | -0.90 | -1.12 | -1.12 | -2.60  | 0.98 | 14.26 | 4.02           | 3.93                  |
| Real Estate              | 1,204.78    | -0.48 | -0.48 | 2.48  | 2.48  | -0.33  | 0.94 | 14.90 | 2.07           | 2.60                  |
| Basic Materials          | 831.84      | 0.30  | 0.30  | -0.15 | -0.15 | -3.85  | 1.44 | 10.80 | 9.43           | 0.47                  |
| Health Care              | 475.11      | 0.00  | 0.00  | 0.00  | 0.00  | 2.87   | 1.72 | 12.21 | 1.75           | 0.24                  |
| Consumer Staples         | 595.30      | 1.46  | 1.46  | -0.12 | -0.12 | 24.03  | 1.34 | 73.89 | 2.10           | 0.18                  |
| Insurance                | 2,231.17    | -0.05 | -0.05 | 0.45  | 0.45  | 43.87  | 1.25 | 7.43  | 4.18           | 0.90                  |
| Consumer Discretionary   | 1,523.97    | -0.92 | -0.92 | -2.13 | -2.13 | 2.50   |      |       |                |                       |
| Energy                   | 955.14      | -0.96 | -0.96 | -0.64 | -0.64 | -16.11 | 0.76 | 9.64  | 5.26           | 0.20                  |
| Technology               | 620.56      | -4.69 | -4.69 | 11.65 | 11.65 | -10.87 | 0.80 |       |                | 0.01                  |
| Utilities                | 468.42      | -2.73 | -2.73 | -4.30 | -4.30 | -5.32  |      |       |                |                       |

### S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

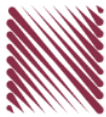
Oil prices jumped 4% as the Israel-Hamas conflict extended into its third day following a surprise attack on Israel by Palestinian militants Hamas. Global benchmark Brent traded 4.53% higher at \$88.41 a barrel.

#### Kuwait Market

The market closed down by – 0.85% at 6,732.12 value traded 29.3 million KD, Premier market value reached 19.9 million KD down by - 0.65% at 7,353.45

#### KSA Market

The market closed down today by - 1.57% at 10,596.02

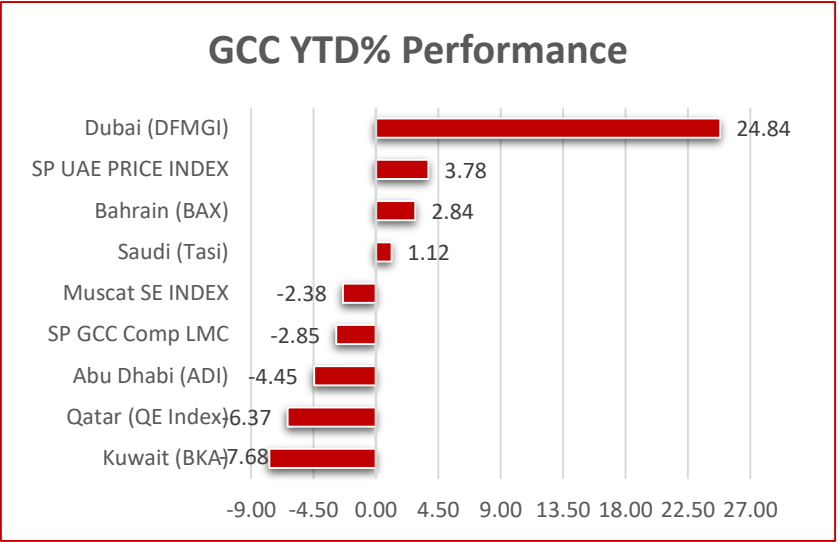


| Description      | Close Price | DTD    | WTD   | MTD   | QTD     | YTD    | P/B    | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|------------------|-------------|--------|-------|-------|---------|--------|--------|--------|----------------|-----------------------|
| Blue Chip Watch  |             |        |       |       |         |        |        |        |                |                       |
| Kuwait           |             |        |       |       |         |        |        |        |                |                       |
| NBK              | 0.871       | -0.46  | -0.46 | -3.86 | -3.86   | -15.16 | 1.68   | 13.16  | 3.88           | 6.91                  |
| KFH              | 0.719       | -0.42  | -0.42 | -1.91 | -1.91   | -3.90  | 1.84   | 18.72  | 2.34           | 10.62                 |
| ZAIN             | 0.468       | -1.06  | -1.06 | -3.90 | -3.90   | -16.87 | 1.64   | 9.64   | 7.48           | 2.02                  |
| BOUBYAN BANK     | 0.600       | -0.99  | -0.99 | -0.66 | -0.66   | -20.30 | 2.46   | 39.71  | 0.94           | 2.38                  |
| AGILITY          | 0.528       | -2.04  | -2.04 | -5.38 | -5.38   | -26.67 | 0.71   | 19.60  | 0.00           | 1.40                  |
| Saudi Arabia     |             |        |       |       |         |        |        |        |                |                       |
| ARAMCO           | 33.55       | 0.30   | 0.30  | -4.14 | -4.14   | 14.97  | 5.31   | 15.98  | 4.03           | 8,119.10              |
| SABIC            | 82.00       | -1.09  | -1.09 | -0.61 | -0.61   | -8.28  | 1.39   | 62.06  | 4.63           | 246.00                |
| STC              | 36.00       | -2.70  | -2.70 | -4.26 | -4.26   | -1.64  | 2.38   | 14.50  | 4.44           | 180.00                |
| AL-RAJHI BANK    | 65.10       | -2.11  | -2.11 | -4.12 | -4.12   | -13.43 | 2.52   | 15.27  | 2.73           | 260.40                |
| NCB              | 32.50       | -1.81  | -1.81 | -0.91 | -0.91   | -13.77 | 1.14   | 10.26  | 3.99           | 195.00                |
| Abu Dhabi        |             |        |       |       |         |        |        |        |                |                       |
| ETISALAT.AD      | 19.82       | -1.78  | -3.03 | -3.03 | -3.03   | -13.30 | 4.13   | 17.50  | 4.04           | 172.20                |
| FAB.AD           | 13.76       | 0.00   | 1.18  | 1.18  | 1.18    | -19.53 | 1.31   | 11.66  | 3.78           | 151.35                |
| EMIRATES NBD     | 18.05       | 1.69   | 1.40  | 1.40  | 1.40    | 38.85  | 1.16   | 5.86   | 3.32           | 112.44                |
| DB ISLAMIC DB    | 5.79        | 0.87   | -1.03 | -1.03 | -1.03   | 1.58   | 1.00   | 7.71   | 5.18           | 41.49                 |
| EMAR.DU          | 7.79        | -0.13  | -3.11 | -3.11 | -3.11   | 32.94  | 0.97   | 8.72   | 3.21           | 67.62                 |
| Qatar            |             |        |       |       |         |        |        |        |                |                       |
| QNB              | 15.350      | 0.00   | 0.00  | -0.32 | -0.32   | -14.72 | 1.38   | 10.28  | 3.91           | 141.41                |
| INDUSTREIS QAT   | 13.210      | -1.05  | -1.05 | -3.65 | -3.65   | 3.12   | 2.13   | 15.31  | 8.33           | 80.16                 |
| QA ISLAMIC BK    | 18.200      | 0.00   | 0.00  | -1.94 | -1.94   | -1.94  | 1.56   | 10.87  | 3.43           | 42.91                 |
| MASRAF AL RAYA   | 2.158       | -1.01  | -1.01 | -3.19 | -3.19   | -31.95 | 0.84   | 19.35  | 4.63           | 20.00                 |
| MESAIEED PETRO   | 1.752       | -1.13  | -1.13 | -5.55 | -5.55   | -17.63 | 1.32   | 16.75  | 6.28           | 22.01                 |
| Oman             |             |        |       |       |         |        |        |        |                |                       |
| BANK MUSCAT      | 0.285       | -0.35  | -0.35 | 2.52  | 2.52    | 3.64   | 0.96   | 11.22  | 5.26           | 2.13                  |
| OMANTEL          | 1.014       | 1.40   | 1.40  | 2.42  | 2.42    | 10.22  | 1.21   | 32.79  | 3.21           | 0.76                  |
| BANK DHOFAR      | 0.175       | 0.00   | 0.00  | 2.94  | 2.94    | 0.00   | 0.73   | 20.09  | 2.86           | 0.52                  |
| NAT BANK OF OMAN | 0.314       | 0.00   | 0.00  | 1.62  | 1.62    | 8.65   | 0.78   | 11.49  | 2.36           | 0.51                  |
| OMINVEST         | 0.400       | 0.00   | 0.00  | 1.52  | 1.52    | -4.76  | 0.89   | 5.88   | 3.75           | 0.27                  |
| Foreign Holding  |             |        |       |       |         |        |        |        |                |                       |
| Date             | NBK         | GBK    | CBK   | ABK   | MUTAHED | KIB    | BURG   | KFH    | BOUB           | WARBA                 |
| 27-September-23  | 24.33%      | 14.78% | 0.07% | 2.01% | 0.23%   | 5.20%  | 17.54% | 13.40% | 6.06%          | 4.95%                 |
| 04-October-23    | 24.32%      | 14.88% | 0.07% | 2.13% | 0.23%   | 5.25%  | 17.54% | 13.39% | 6.05%          | 4.99%                 |

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.85 %The leading sector bottom performance indices today are Technology -4.69 % Utilities -2.73 % Telecom -1.66 % respectively

KSA

Saudi Armco has a positive performance today by + 0.30 %, SABIC has a negative performance today by - 1.09 %. STC has a negative performance today - 2.70 %, Al Rajhi Bank has a negative performance today by - 2.11 %

U.A.E

ETISALAT .AD has a negative performance today by -1.78 %, FAB.AD flat performance today



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